Contact / Interfund Contact Maintenance

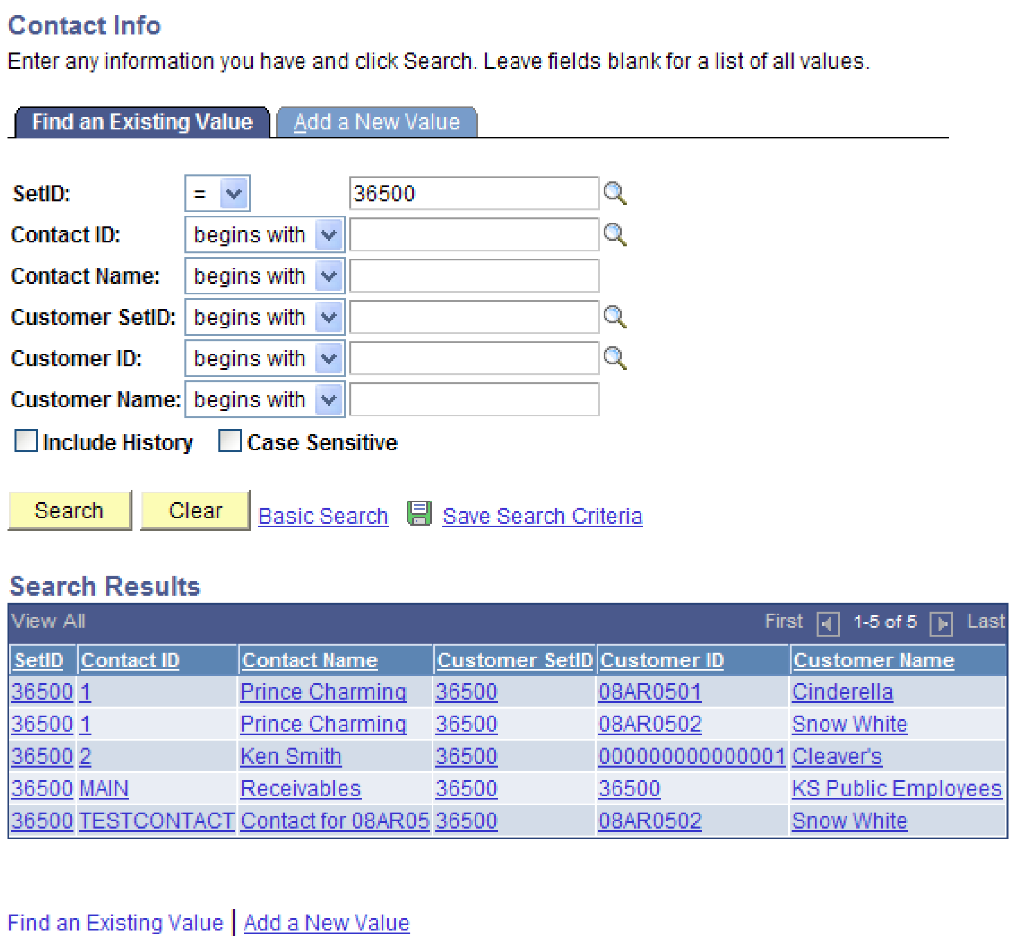
Statewide Management, Accounting and Reporting Tool

This job aid will assist in updating customer and interfund contacts. For entering new contacts, please refer to SMART Training Course AR350: Maintaining Customers.

User Roles that can update contacts are: Agency Customer Creator, Agency AR Admin, Central AR Configurator, Agency Billing Admin, and Central Billing Configurator.

1. Navigate to Customers>Contact Information

A search page will be displayed. Enter your search criteria and click the Search button.



Contact Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

SetID: = 36500

Contact ID: begins with

Contact Name: begins with

Customer SetID: begins with

Customer ID: begins with

Customer Name: begins with

Include History Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

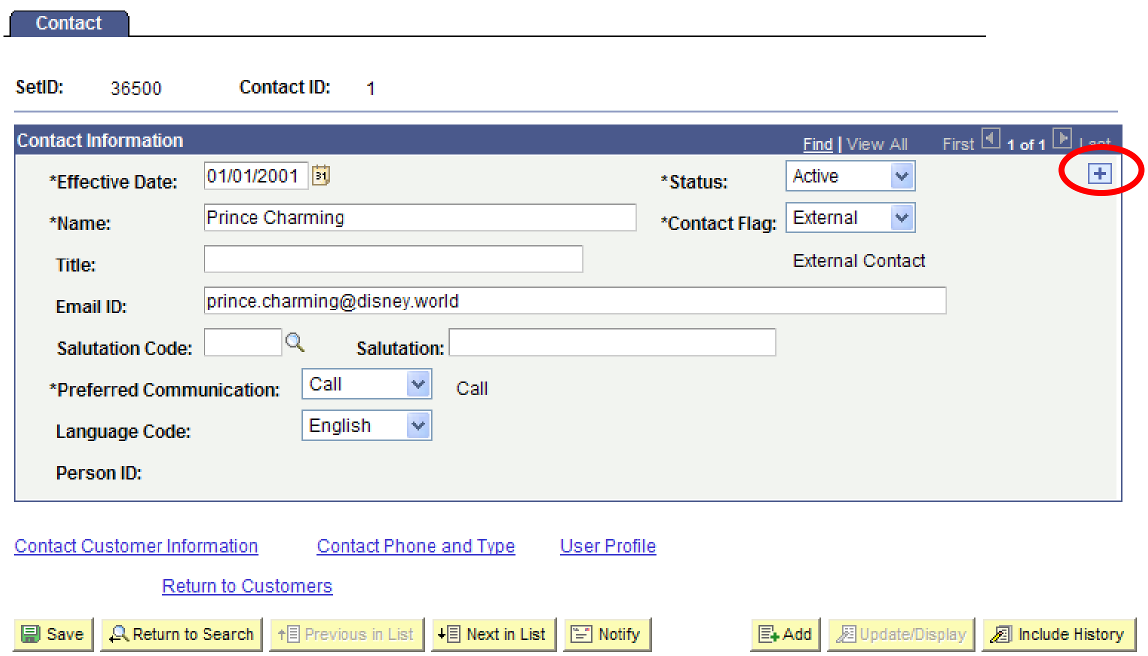
View All First 1-5 of 5 Last

SetID	Contact ID	Contact Name	Customer SetID	Customer ID	Customer Name
36500	1	Prince Charming	36500	08AR0501	Cinderella
36500	1	Prince Charming	36500	08AR0502	Snow White
36500	2	Ken Smith	36500	000000000000001	Cleaver's
36500	MAIN	Receivables	36500	36500	KS Public Employees
36500	TESTCONTACT	Contact for 08AR05	36500	08AR0502	Snow White

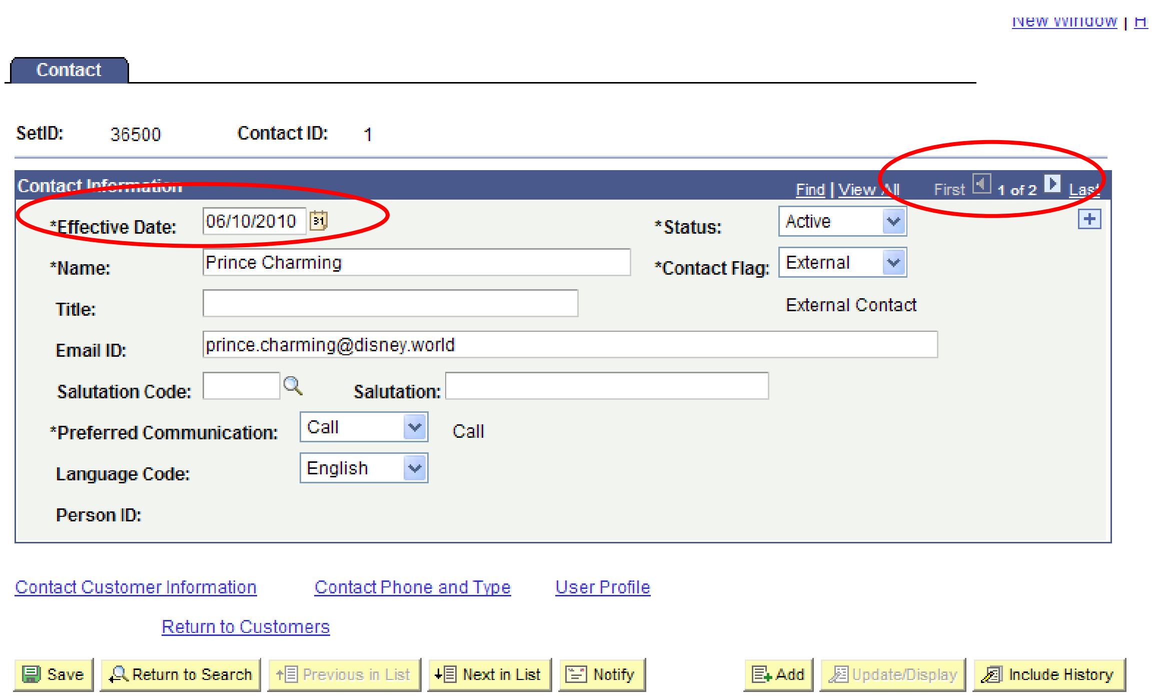
Find an Existing Value | Add a New Value

2. Select the Contact ID that needs to be updated.

3. Click the blue plus sign (+) on the right of the page.



Note that the Effective Date has changed to the current date and there are now two pages.



4. Make all updates as necessary and click the ‘Save’ button.